

# MOSAIC<sup>®</sup>

## CONSULTING GROUP

### MANAGING OPEN ENROLLMENT

*Presented by:* Cheri Wadlington

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## INTRODUCTION

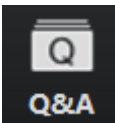
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## AGENDA – Managing Open Enrollment

- Questions to Consider
- Set up
- Testing



Feel free to ask questions during the session or use the Q&A icon in the bottom of your screen to submit them

## ANALYSIS QUESTIONS TO CONSIDER:

1. Have you ever used Open Enrollment or Life Events?
2. What is the plan year effective date?
3. Will Open Enrollment be Active or Passive?
4. How many pay frequencies are there?
5. Are pay dates on the same day?
6. What benefits will be included?
7. Do you have benefit vendor interfaces in place or will you need new ones?
8. Are there new benefit plans or vendors?



## PENDING EFFECTIVE DATE:

The date employee records will be updated with employee elections. It is a major driving force in Open Enrollment and has to be determined before Open Enrollment configuration can begin.



**Contact your payroll team**

Information about the Open Enrollment Session:	
What is the Open Enrollment Session Open date?	11/15/17
What is the Open Enrollment Session Close date?	12/15/17
Required Information to calculate the Open Enrollment Pending Effective Date	
Date fields that do not meet validation criteria - See red triangle for detailed explanation	
Is the company setup to use prorate?	No
Deduction/Benefit Group within OE	
Paygroups within each Deduction/Benefit Group	Biweekly
Company Setup for Prorate	No Pro-rate
Information about when the NEW deductions begin:	
What is the start date for benefits?	1/1/18
What is the start date for the deductions?	12/23/17
What is the pay period start date for this payroll?	12/23/17
What is the pay period end date for this payroll?	1/5/18
What is the pay date for the first payroll for new deductions?	1/5/18
Information about when the CURRENT deductions end:	
What is the end date for benefits?	12/31/17
What is the end date for the deductions?	12/22/17
What is the pay period start date for this payroll?	12/9/17
What is the pay period end date for this payroll?	12/22/17
What is the pay date for the last payroll for the old deductions?	12/22/17

## PENDING EFFECTIVE ESTIMATOR

## INCLUDED BUSINESS RULES FOR OE

- Deduction/Benefit Groups
- Benefit Options
- Deduction Codes



## Dates

Session Open      11/15/2017

Session Close      11/30/2017

Pending Effective Date      01/01/2018

## Administrator Options

Benefit options display order by

Option Cost (Employee) ▼

- ☒ Use existing deduction start date when re-enrolling in a plan.
- ☒ Use existing benefit start date when re-enrolling in a plan. **(Plans of the FSA type will always use the coverage start dates defined by the session.)**
- ☒ Use existing deduction stop date when cancelling an already cancelled plan.
- ☒ Use existing benefit stop date when cancelling an already cancelled plan.
- ☒ Display days remaining in the session.
- ☒ Allow employees to add and edit Beneficiaries and Dependents within the session.
- ☒ Allow employees to modify elections during the active session.
- ☐ Allow employees to keep existing benefit plan enrollments including those of the FSA type (Passive Enrollment)

## Define Session

Deduction/Benefit Group List


Session Summary

## Define Session

 |  

### Session Description


Code      OE2018


Description      • Open Enrollment 2018 


Plan Year      • 2018

Status      • Incomplete ▼

### Dates

Session Open      • 11 / 15 / 2017 x 

Session Close      • 12 / 15 / 2017 x 

Pending Effective Date      • ? 12 / 28 / 2017 x 

## Current Sessions

Actions <input type="text"/> <input type="button" value="OK"/> <input type="button" value="+"/> <input type="checkbox"/> Hide						
Find by <input type="text" value="Code"/> <input type="text" value="starts with"/> <input type="text"/> <input type="button" value="+"/> <input type="button" value="-"/> <input type="button" value="Search"/>						
Select	Status	Description	Code	Plan Year ▾	Session Open	Session Close
<input type="checkbox"/>	✓ Live	<a href="#">2018 Open Enrollment</a>	2018OE	2018	11/06/2017	11/17/2017
<input type="checkbox"/>	✓ Live	<a href="#">2018 Open Enrollment</a>	218OEL	2018	11/13/2017	11/27/2017
<input type="checkbox"/>	✓ Live	<a href="#">2018 Open Enrollment NonEx</a>	2018OEA	2018	11/06/2017	11/17/2017
<input type="checkbox"/>	✓ Live	<a href="#">2018 Open Enrollment NonEx</a>	2018OELA	2018	11/13/2017	11/27/2018
<input type="checkbox"/>	✓ Live	<a href="#">2018 HI Open Enrollment Ex</a>	2018HIEX	2018	12/07/2017	12/21/2017
<input type="checkbox"/>	✓ Live	<a href="#">2018 HI Open Enrollment NonEx</a>	2018HINON	2018	12/07/2017	12/21/2017



Required Information to calculate the Open Enrollment Pending Effective Date									
Date fields that do not meet validation criteria - See red triangle for detailed explanation									
Is the company setup to use prorate?	No								
Deduction/Benefit Group within OE	A	B	C	D	E	F	G	H	
Paygroups within each Deduction/Benefit Group									
Pay Frequency of the Pay Group above	Weekly	Weekly	Biweekly	Biweekly	Weekly	Weekly	Weekly	Biweekly	
Company Setup for Prorate	No Pro-rate	No Pro-rate	No Pro-rate	No Pro-rate	No Pro-rate	No Pro-rate	No Pro-rate	No Pro-rate	
Information about when the NEW deductions begin:									
What is the start date for benefits?	1/1/18	1/1/18	1/1/18		1/1/18	1/1/18	1/1/18	1/1/18	
What is the start date for the deductions?	12/24/17	12/24/17	1/1/18		12/25/17	12/25/17	12/25/17	12/18/17	
What is the pay period start date for this payroll?	12/24/17	12/24/17	12/24/17		12/25/17	12/25/17	12/25/17	12/18/17	
What is the pay period end date for this payroll?	12/30/17	12/30/17	1/6/18		12/31/17	12/31/17	12/31/17	12/29/17	
What is the pay date for the first payroll for new deductions?	1/5/18	1/5/18	1/12/18		1/4/18	1/4/18	1/4/18	1/5/18	
Information about when the CURRENT deductions end:									
What is the end date for benefits?	12/31/17	12/31/17	12/31/17		12/31/17	12/31/17	12/31/17	12/31/17	
What is the end date for the deductions?	12/23/17	12/23/17	12/23/17		12/24/17	12/24/17	12/24/17	12/17/17	
What is the pay period start date for this payroll?	12/17/17	12/17/17	12/10/17		12/18/17	12/18/17	12/18/17	12/4/17	
What is the pay period end date for this payroll?	12/23/17	12/23/17	12/23/17		12/24/17	12/24/17	12/24/17	12/17/17	
What is the pay date for the last payroll for the old deductions?	12/29/17	12/29/17	12/29/17		12/28/17	12/28/17	12/28/17	12/22/17	



## SESSION MESSAGING:

- Links
- Documents
- Pictures

Messages	
Employee Welcome Message	<p>Welcome to the 2017 Open Enrollment Session. You must complete your enrollment during November-December 2017 to be effective for 2018.&lt;br&gt;</p>
Beneficiaries And Dependents Message	<p>This page allows you to add or make changes to your name beneficiaries. &lt;b&gt;Please note that adding or changing contacts on this page does not mean that they are automatically assigned to your existing plan enrollments&lt;/b&gt;. You will still need to</p>
Confirm Your Elections Or Changes Message	<p>This page shows a summary of the changes you are about to make. Please verify your changes carefully before submitting. If you need to make any edits you can do so by selecting the plan type or plan description hyperlink to return to the election page.</p>
Confirmation Message	<p>This page summarizes the changes your are about to make. Please review your changes before submitting. If you need to make any changes, select the type or plan description hyperlink to return to return to the election page. When you are satisfied</p>

## EMPLOYEE ELECTION IS REQUIRED

<input type="checkbox"/>	Display Order	Code	Deduction/Benefit Type	Employee Election Is Required	Do Not Allow Decline	Decline By Benefit Plan	Decline By Benefit Type
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	MED	Medical	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text" value="2"/>	HSA	Health Savings Account	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text" value="3"/>	DEN	Dental	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text" value="4"/>	VIS	Vision	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## DETERMINE ALL BENEFIT PLANS

<input type="checkbox"/>	Display Order	Code	Deduction/Benefit Plan	Configure Benefit Options	Employee Can Decline Plan	Display Deduction Start Date
<b>Medical</b>						
<input type="checkbox"/>	<input type="text"/>	HDH9P	Medical HDHP Discount	<input type="text"/> ?	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="text"/>	HDHP	Medical HDHP	<input type="text"/> ?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## QUALIFIERS:

Qualifiers are a method of segmenting out Deduction/Benefit Groups based on additional parameters

<div> <div>+</div> <div>×</div> </div>				
Qualifier	Value	From	To	Delete
Employment status	A - Active			<input type="checkbox"/>
Employment status	L - Leave of absence			<input type="checkbox"/>
Full time/Part time	F - Full Time			<input type="checkbox"/>
Pay group	BW1OTO - BW1 OTO			<input type="checkbox"/>

**PRO TIP:** Always add Active and Leave of Absence as qualifiers to prevent Terminated employees from displaying in the session.

[Current Sessions](#)
[Employee Elections](#)
[Enrollment History](#)

## Employee Elections

Open Enrollment 2018 ▼

▼

OK

Eligible Employees

Find by

Employee last name ▼

starts with ▼

+

-

Search

Name ▲	Employee Number	E-Mail	Enrollment Status	Session Status	Deduction/Benefit Group	Company Name
<a href="#">Barr, Grace</a>	829309390	<a href="mailto:Grace.Barr@ultimate.com">Grace.Barr@ultimate.com</a>	Not Started	Test	Administrative	Eastwood Industries - HQ(12)
<a href="#">Battle, Robert</a>	829309317	<a href="mailto:Robert.Battle@ultimate.com">Robert.Battle@ultimate.com</a>	In Progress	Test	Administrative	Eastwood Industries - HQ(12)
<a href="#">Becker, Danielle</a>	829309371	<a href="mailto:Danielle.Becker@ultimate.com">Danielle.Becker@ultimate.com</a>	In Progress	Test	Administrative	Eastwood Industries - HQ(12)

Employee Open Enrollment  
Open Enrollment 2018  
Kim Bosch - 000012380

About Open Enrollment

**Verify Beneficiary And Dependent Information**

Health Savings Account

Medical

Confirm Your Elections Or Changes

## Verify Beneficiary and Dependent Information



Find by Status ▼ Active ▼

Name ▲	Relationship	Designation
<a href="#">Bosch, Evelyn</a>	Spouse	<input type="checkbox"/> Beneficiary <input checked="" type="checkbox"/> Dependent <input type="checkbox"/> Emergency contact



**THIS TAB IS NOT IN TEST MODE!**

## THOROUGH TESTING SHOULD INCLUDE:

- ✓ *Decline buttons*
- ✓ *Plan rates*
- ✓ *Plan names*
- ✓ *Plan messaging*
- ✓ *FSA Maximums*
- ✓ *Age limits*
- ✓ *Valid dependent relationships*
- ✓ *Any Open Enrollment customs*



## RE-SET ELECTIONS AFTER TESTING:

Current Sessions   Employee Elections   Enrollment History

### Current Sessions

Actions	<input type="text" value=""/>	OK	<input type="button" value="+"/>
Find by	<input type="text" value="Add"/> <input type="text" value="Reset elections"/>	<input type="text" value="starts with"/>	<input type="text" value=""/>
Select	Status	Description	
<input checked="" type="checkbox"/>	<input checked="" type="radio"/> Test	<a href="#">Open Enrollment</a>	



## DURING LIVE SESSION:

- Admin can re-open elections if necessary
- Admin can send e-mails by status

## Employee Elections

**Role**

Administrator ▼

**Session**

Open Enrollment 2018 ▼

**Action**

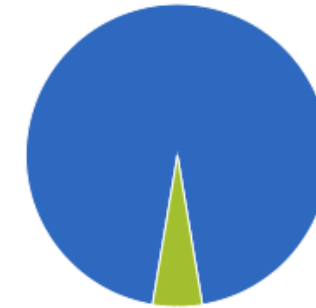
Reopen completed elections  
Send email to all eligible employees  
Send email to all not started  
Send email to all in progress  
Send email to all completed

OK

Eligible Employees

### Election Overview

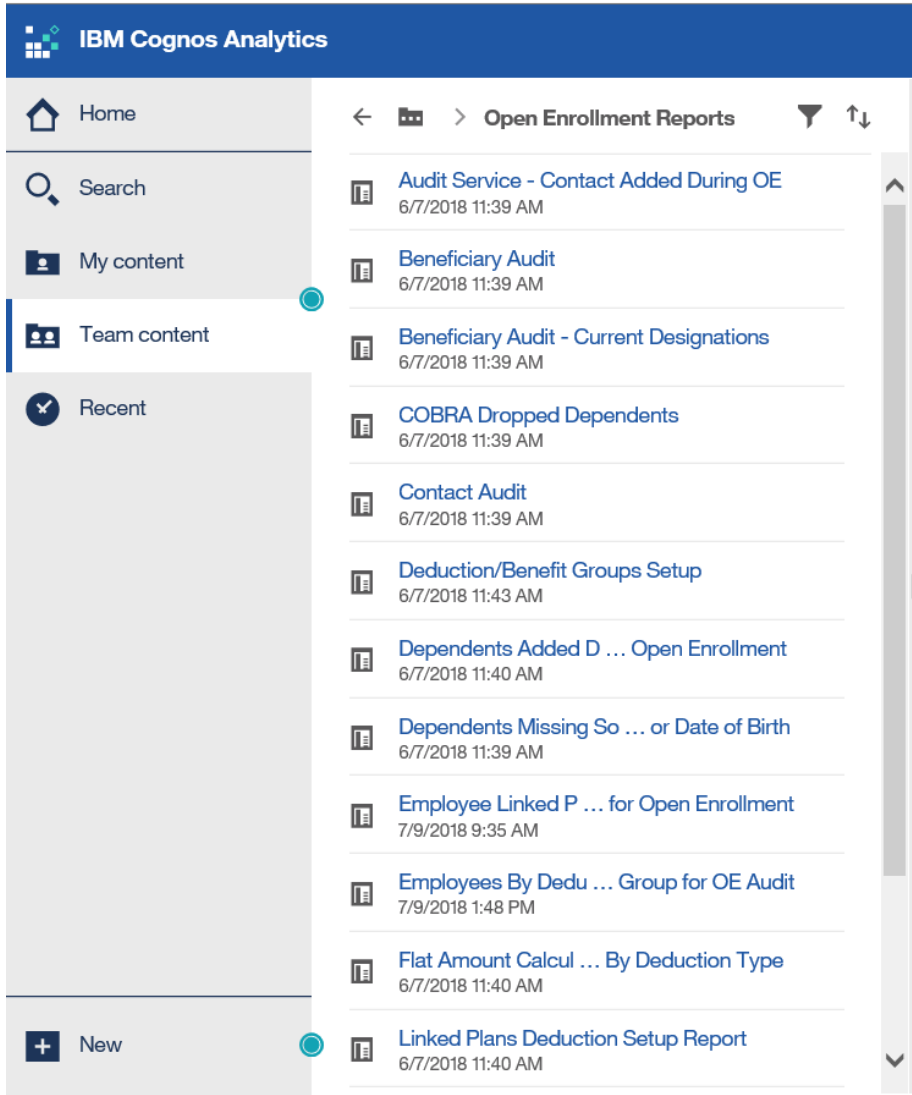
#### Open Enrollment 2018



- Not Started - 94.7%
- In Progress - 5.3%

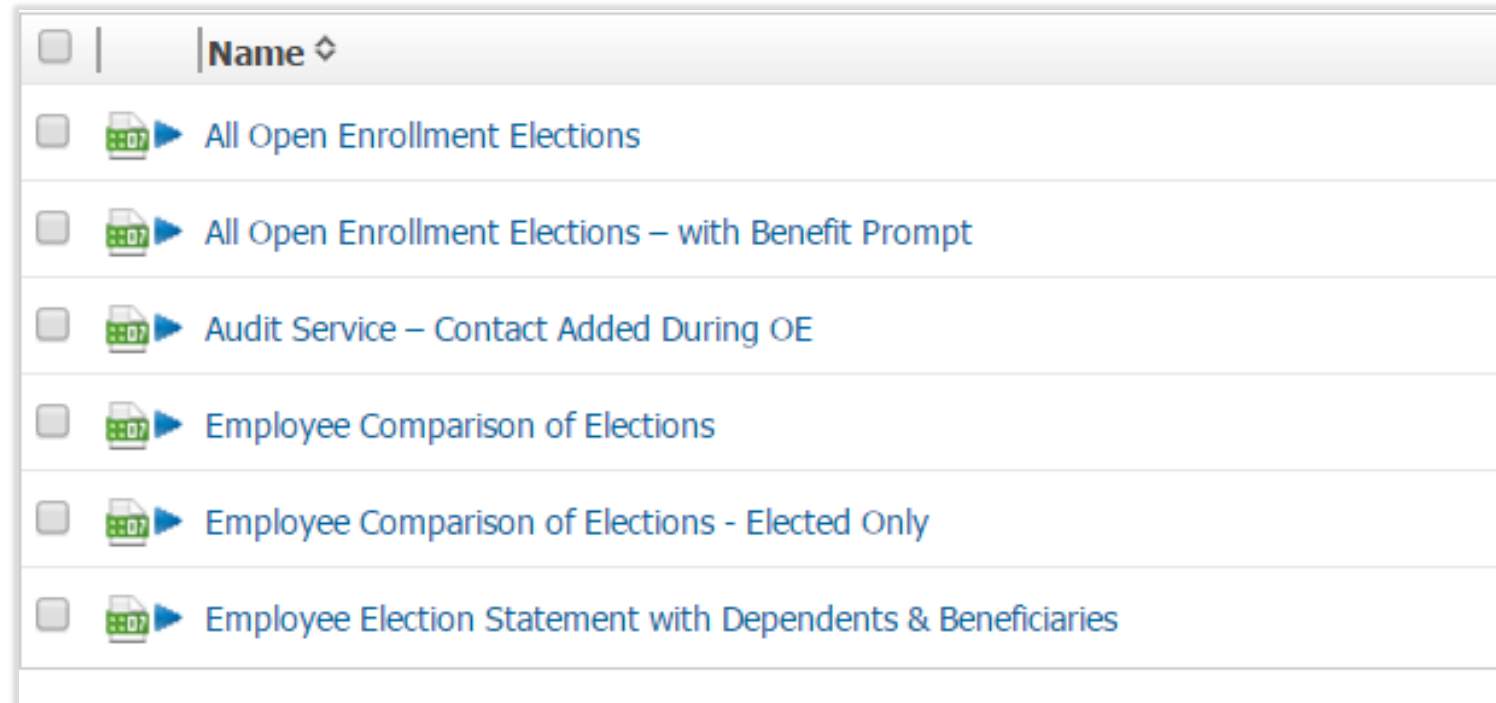
### Reports

- [COBRA Dropped Dependents](#)
- [Dependents Beyond Qualifying Age](#)
- [Employee Enrollment Status](#)
- [Employees with Benefit Group Changes](#)
- [Employees with Pending Evidence of Insurability](#)
- [Sent Email Notifications](#)
- [Summary of Elections](#)



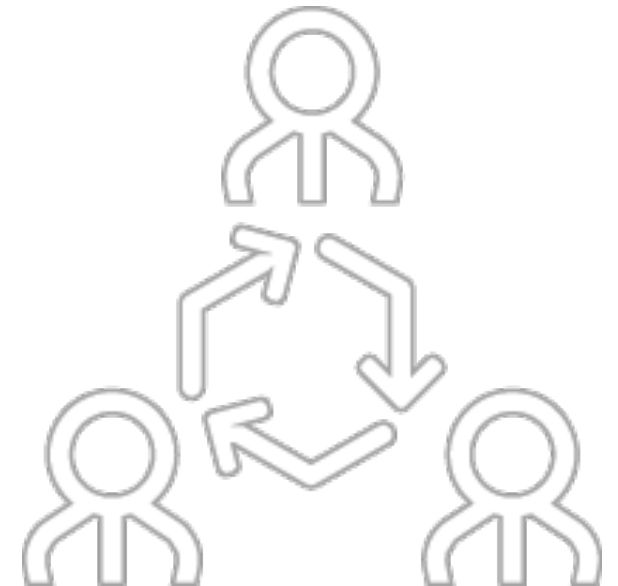
## Path to BI Reports:

Team content > UltiPro BI Content > UltiPro BI Content for Core HR and Payroll > UltiPro Delivered Reports > Open Enrollment Reports Folder



## Interfaces – Sending Open Enrollment Data to Vendors

- Occurs after all employee elections have been made
- Occurs after administrators have audited data
- NO employee elections should be entered after data is sent



## ADDITIONAL NOTES:

- New Vendors / interfaces need to be addressed EARLY
- Session open and close dates can be changed after go-live
- The only thing that cannot be changed during OE configuration is the Pending Effective Date
- Open Enrollment Sessions cannot be copied from year to year, it is a new configuration each year
- Mosaic recommends Active enrollment sessions to ensure all employees are aware of all benefits, HR has audit of elections for all, vendors receive full election files
- Rate changes do not need to be solidified prior to starting configuration
- The Deduction Stop Utility must be executed *after* the last pay of the plan year but *before* the pending effective date





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